

# BUDGET AND FINANCE ANALYST / SENIOR BUDGET AND FINANCE ANALYST

# **Purpose:**

To actively support and uphold the City's stated mission and values. To perform a variety of professional level administrative and analytical work involving the preparation, study and application of City budgets and finances; and to perform duties involved in the research, analysis and development of efficient systems.

# Supervision Received and Exercised:

# **Budget and Finance Analyst**

Receives general supervision from the Budget Manager, and functional supervision from the Lead Budget and Finance Analyst.

# Senior Budget and Finance Analyst

Receives general supervision from the Budget Manager, and functional supervision from the Lead Budget and Finance Analyst. May exercise functional and technical supervision over less experienced staff.

# **Distinguishing Characteristic:**

#### Budget and Finance Analyst

This is the entry level class in the Budget and Finance Analyst series. This class is distinguished from the Senior Budget and Finance Analyst by the performance of the more routine administrative and analytical duties assigned to positions within the series including assisting in the city budget preparation and administration; conducting fiscal impact analyses; revenue and expenditure forecasting; and conducting administrative and systems studies. Since this class is typically used as a training class, employees may have only limited directly related work experience.

# Senior Budget and Finance Analyst

#### CITY OF TEMPE

Budget and Finance Analyst / Senior Budget and Finance Analyst (continued)

This is the journey level class within the Budget and Finance Analyst series. Employees within this class are distinguished from the Budget and Finance Analyst by the performance of the full range of duties as assigned including conducting indepth administrative and systems studies; financial analysis; developing and performing independent statistical and research studies; preparing comprehensive multiyear financial econometric models and plans along with economic impact studies; and developing and assisting in the implementation of goals and objectives for the Budget and Finance Division. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise, and are fully aware of the operating procedures and policies of the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the lower class of Budget and Finance Analyst, or, when filled from the outside, require prior budget and finance experience, preferably in a public agency. Appointment to the higher class requires that the employee be performing the full range of duties assigned to the class.

# **Essential Functions:**

Duties may include, but are not limited to, the following:

- Participate in annual operating, capital and city budget preparation and administration; conduct fiscal / economic impact studies and cost / benefit analyses; coordinate the preparation of manuals and comprehensive and timely budget documents.
- Perform comprehensive multiyear econometric models and scenarios; financial projections and plans involving revenue and expenditure forecast analysis.
- Research economic trends at national, regional, state and local levels.
- Assist in developing city financial policies.
- Conduct city-wide base budget hearings; monitor city-wide departmental patterns; prepare and distribute budget reviews.
- Advise management, departments, and divisions on budget problems, policies, and procedures and assist them in the maintenance of proper budgetary controls.
- Assist with the preparation and administration of the city's capital improvement program, debt management plan, and annual financial reports; assist

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# CITY OF TEMPE

Budget and Finance Analyst / Senior Budget and Finance Analyst (continued)

department and division heads in developing and improving operational objectives.

- Conduct administrative and systems studies; evaluate, and prepare reports and recommendations for improving policies, procedures, methods, and systems of operation.
- Conduct performance measurement / benchmarking and productivity studies; review performance and program direction; evaluate and recommend changes to improve productivity.
- Design and conduct surveys; economic impact studies; utility rate reviews; and prepare proposals on financial and staffing requirements; design, develop and perform various independent statistical and research studies to monitor economic processes affecting the budget.
- Present financial analysis to council committees; present policy analysis or other financial feasibility studies to senior management, council committees, and policy makers.
- Establish short and long range planning goals and objectives for, and coordinate special projects assigned to the Budget and Finance section.
- Perform the costing of Police and Fire MOU agreements; generate the Quarterly Revenue Report; and provide financial analysis on upcoming legislative issues that may impact city revenues.
- Perform related duties as assigned.

#### **Minimum Qualifications:**

#### **Experience:**

#### **Budget and Finance Analyst**

Two years of full-time, professional experience in budget, finance, economics, management analysis, or accounting work preferably some of which is in government.

# Senior Budget and Finance Analyst

# CITY OF TEMPE

Budget and Finance Analyst / Senior Budget and Finance Analyst (continued)

Three years of full-time, professional experience in budget, finance, economics, management analysis, or accounting work which should include at least two years of increasingly responsible budget and finance experience in government.

#### **Education:**

# **Budget and Finance Analyst**

Equivalent to a Bachelor's degree from an accredited college or university with major course work in business administration, finance, statistics and research, accounting or a degree related to the core functions of this position. A Master's degree is highly desirable.

# Senior Budget and Finance Analyst

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None

#### **Examples of Physical and/or Mental Activities:**

(Pending)

#### **Competencies:**

(Pending)

Job Code: 321/374

Status for both: Exempt / Classified